

Notes from SAM Refresher Training  
May 3, 2006

**Open discussion:**

**Q: GM – Can we pick and choose who we want to access public queries or are public queries available to everyone?**

A: Public queries are available for everyone to use. If you have a query that you want to share with specific individuals you can send them a screen shot of the query and they can create the query under their profile.

**Q: City of Norfolk – How do I access my SWAM data only? When I create a query using the query wizard I get other data besides mine.**

A: You should be using the custom DMBE report to get the SWAM data for your agency. That report is found under reports, report wizard. Click on the custom folder then click on DMBE and follow the prompts to run the report.

**Q: DHP – We have found instances where the custom DMBE report did not correctly identify some of our known SWAM DMBE certified vendors. We were able to identify those vendors by creating a query to validate our SWAM purchases. With the query results we were able to account for all of our SWAM purchases and we were able to share our findings with the DMBE staff so that they could correct the vendors status in SAM. Would it be possible to save this as a public query for other agencies to use? They would only have to change the agency code in the query in order to get their data.**

A: Yes, please forward the query information to the DOA Charge Card Administration Team at the [cca@doa.virginia.gov](mailto:cca@doa.virginia.gov) email address for consideration for posting as a public query in SAM.

**Q: NVCC – On the cardholder screen in NetService where we access the specifics for a cardholder could you please explain what Maintain Retail Limit is used for and what Manage TBR Unit is used for?**

A: Maintain Retail Limit is used travel cards. This is where program administrators can limit the amount of purchases a travel cardholder can make at a retail establishment. Manage TBR Unit is used to manage the hierarchy and is not applicable to the Commonwealth's Program.

**Q: DLI – Effective FY2007, Service Area will replace subprogram in the expenditure accounting structure. Will this change be incorporated in the accounting structure in the SAM database?**

A: That name change will be reflected in SAM on June 30<sup>th</sup>.

**Q: VDOT - When should employees sign the employee agreement form?**

A: Employees should sign the employee agreement when they are given their GE MasterCard.

**Q: VDOT – Is there an instruction manual available for SAM?**

A: Yes, there is a CD that provides all of the applicable information needed to successfully manage and administer the MasterCard program. Program Administrators and their backups should have a copy of the CD.